

# CRM RAPID HEALTH-CHECK

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20 questions are listed below. Rate your firm or a selected business unit within it for its CRM performance. Use an 11-point scale, thus:

We do not  
do this at all

We excel  
at this

0 1 2 3 4 5 6 7 8 9 10

Score  
0 to 10

1. We segment customers by value, as well as by service requirements, by industry sector and in other appropriate ways

2. We have identified our strategically significant customers and understand their value and requirements

3. We have a comprehensive customer database including customers' contact details, history, value and service expectations, satisfaction levels, and switching propensity

4. There are effective procedures in place for recruiting, managing, accrediting and briefing major suppliers and partners about customer requirements

5. All employees have a clear understanding of our segmentation strategy, customer profiles, and the value they require

6. We regularly and comprehensively test customer perceptions of their experience of dealing with our company

7. We all (front office and back office) have a clear and shared understanding of the main sources of customer value and/or satisfaction/ dissatisfaction

8. We create customised value propositions when appropriate. We involve customers in this process

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9. Our processes are designed to deliver excellent customer experience/value

10. There is clear accountability for customers and/or segments in the organisation chart

11. Relevant customer metrics/ KPIs are in place and used effectively

12. There is a clear and shared customer acquisition plan

13. There is a clear and shared customer retention plan

14. There is a clear and shared customer development plan

15. The senior management team are committed to and practise the "Customer First" value

16. Those responsible for recruiting, training and retaining people understand the skills, knowledge and attitude requirements needed to underpin the "Customer First" value

17. Our people are appropriately empowered to co-manage customer experience effectively.

18. There is a visible, funded plan for developing the IT systems needed to enhance customer experience

19. Key business processes (both functional and cross-functional) are defined, executed and improved in order to improve customer experience, value and satisfaction

20. We benchmark our CRM performance against best-in-class and are committed to continuous improvement

How did you do?

>150      You are a CRM superstar

100-150    You are getting there. Keep working at it

<100      Sell your share options now